

Organizing Your Genealogy Research

Online genealogy websites have made searching for your ancestors easier than ever. However, because finding records has become fast and easy, records pile up quickly and many people are finding they are more scattered, less focused, and more disorganized. Now, it is more important than ever to start organized, stay organized, and to organize the information and records you discover. In this class, we will talk about how to organize records, information, and your research process.

Organizing Files

As you find documents related to your research goal, make sure to organize them so that you can find and analyze them again as needed. There is no right way to organize your files. You will need to develop a system that works for you. Below are some suggestions and tips on how to set up a good organizing system.

Four Type of Information

Build your filing system around the four main types of information: date, family or surname, record type, and locality. The four types of information can be used in any order. For example, you may choose to organize around families first, then dates, and then localities. Or you may structure your system around localities first, then record types and then dates. Use all four types of information to build an effective system.

Paper, Digital, or Online Trees

Consider how you are going to store your files. Will you keep paper copies? Do you prefer to store your files on your computer's hard drive or in the cloud? Or do you want to upload and attach all of your documents to an online tree such as those found on Ancestry.com or FamilySearch.org? You may decide to keep some documents in multiple formats. Decide where you want to store your files and then create one filing system that tracks all of your files, regardless of where and how they are stored.

Label Your Paper Documents

Paper documents may become disconnected from related research logs or title pages. To quickly identify paper documents, write or print the full source citation on the front of the document. (Record the source on the front so if the document is copied, the source is copied.) Include enough information in the source citation so you can find the record again. You can label the document by hand, use document labels, or add the label using a computer program.

Give Your Computer Files Descriptive Names

Name your computer files with full, descriptive names. Make sure all of the files in a folder have the same structure to their name. Include enough information so you don't have to open the file in order to know what it is. For important files, add a punctuation mark to the beginning of the name so they are listed first in the folder. Also, remember that the name of the folder is part of the file's name so information in the folder name does not need to be repeated in the file name.

Connect Research Notes and Files using Hyperlinks

A hyperlink is a clickable link that connects text in a file or on a webpage with other files or pages. Hyperlinks are usually identified by text which is blue and underlined. Hyperlinks can help connect your

research log and saved documents or websites. Hyperlinks can also help connect research logs with extracts, abstracts, and transcripts, connect timelines and documents, and connect research logs and timelines. On a computer running Windows, CTRL + K will usually insert a hyperlink.

Organize around Families

Instead of creating files for individuals (which often causes you to duplicate records and efforts), organize your files around families instead.

- A family file starts with the marriage record of a couple
- Records for children are filed with their parents until they marry. Records created after their marriage are filed in a new file for the child and their spouse.
- If either spouse dies and the surviving spouse remarries, create a new file for documents relating to the second marriage. Documents for the children of the first couple stay with the original file.
- A file “ends” (meaning no documents created after that date are included) when the last member of the family either marries or dies.

Grow your File System

Your filing system should be a growing organism. Design a system that will grow with you. Don't spend time trying to plan the entire structure before you organize, instead create files and folders as you need them. Plan to spend time regularly cleaning out, updating, and pruning your system. Designing a growing system will make it easier to adapt as you learn more and become more comfortable with your research skills.

Example Filing Systems

A good filing system will be built around four separate divisions: families/surnames, localities, record types, and dates. When you build your filing system, make sure to use all four divisions.

Example: Organize by Family

Organize first by family, then by locality (if necessary), then document number. Digital file names should include the document number, record type/details, locality, the people involved, and the date of record.

Example: Organize by Locality

Organize first by locality, then by record type, then by family line (if necessary). Hyperlink documents to a research log. Digital file names should include family involved, record details, and date of record (if necessary)

Organizing Information

In addition to collection records, genealogists also gather information found in those records. Make sure you spend time organizing that information. There are many tools that can help you organize your information.

Software and Online Trees

Information such as names, dates, and relationships can be organized into genealogy software such as RootsMagic, Legacy, AncestralQuest, FamilyTreeMaker and more. You can view a comparison of available genealogy software at https://en.wikipedia.org/wiki/Comparison_of_genealogy_software.

Information can also be organized using online trees available through Ancestry.com, FamilySearch Family Tree, MyHeritage.com, and more.

Research Logs

A research log (also known as a research journal), is a tool that lets you keep track of the sources you have searched, whether or not you found your ancestor in that source. Research logs help prevent duplicate searches. If it takes several months before you pick up a research project again, a research log can help you pick up from where you left off. A research log can also be used a planning tool. Write down details about the sources you want to search next before visiting a library or archive.

Research logs are traditionally kept in a table format. However, a narrative journal works as well. Many different pre-printed research logs are available. (Several research log forms are available in the FamilySearch Wiki or use an online search engine such as Google or Bing to locate other research log templates.) You can also create your own research log. If you do so, include columns for the date of each search, the full source citation, the results, and a document number. You can also add columns for the repository/call number, the purpose of each search, the condition of the record, whether the record is original or derivative, and more. At the top of the log, make sure to include information about the research project as well as the name of the researcher.

Extracts, Transcripts, and Abstracts

After you locate each document, spend time reading and evaluating the information in the document. Read through each line, field, or column. Write down names, dates, and locations. Note additional information such as occupations, religious affiliation, socioeconomic status, and relationships. Depending on the record type, extract information using a table or transcribe and abstract each record.

A transcript is an exact word-for-word copy of an original document and preserves original spelling, grammar, punctuation, and line breaks. An abstract is a summary of a document, highlighting the most important pieces of information. Creating either a transcript or an abstract requires that you carefully read through an original document. This will allow you to process information and highlight clues that may be otherwise overlooked.

An extract, transcript, or abstract can be created using a pad of paper or a word processing program. When you transcribe or abstract a record, make sure to include the entire source citation. File the completed transcript or abstract with your other documents.

Timelines

A timeline is a list of events sorted chronologically. Timelines allow you to look at everything you know about an individual or family and quickly determine what records or events are missing from your research. Timelines can help you identify your assumptions as well as gaps in your ancestors life where you have little or no documentation. A good timeline provides an overview of your ancestor's life.

Timelines can be recorded either as a list or in a table. Make sure to record each event in your ancestor's life including birth, marriage, and death, births and marriages of children, census enumerations, land purchases, wills written, events witnessed, dates of immigration or naturalization, newspaper articles, and more. Add additional rows to highlight time spans with no documentation or to identify assumptions. Consider including columns for event date, event details, record type, location, and source(s).

Tables

Tables are a great way to extract and correlate information from multiple records. We have already discussed two types of tables: research logs and timelines. Tables let you compile and correlate information in a logical and visual manner. Tables can be used to list information from the same record type over a span of years. They can be used to follow the purchase and sale of land. They can be used

to examines variations in birth years, compare families with the same surname in the same location, track various documents from a single record type, and more. Creating tables will help you visually examine information from multiple record types.

Organizing Your Research Process

Online websites offer record hints. However, following these hints sometimes means jumping from one ancestor to the next, randomly capturing records, and never really answering a research goal. Instead of following hints, try organizing your research process.

Plan Your Research Process

Decide how you want to research. How do you plan your research? What steps do you take each time you search for or find a record? When do you know you have reached a conclusion? Also spend time setting up the tools you are using to capture and organize information while your research, such as a research log, timeline, genealogy software, and more. Finally, decide how and where you will save files related to your research.

Start with a Goal and a Plan

Start with a research goal. Identify one ancestor and ask a question about that ancestor. A good research goal is finite and achievable. Goals are usually relationships, dates, or events in your ancestor's life. Then, identify records most likely to help answer your research goal. As you research, prioritize finding those records first.

Identify Your Research Steps

The steps you take as you research will help you effectively find and evaluate your records. One possible research process may include the following steps:

- Search records
- Update your research log
- Extract, transcribe, or abstract records
- Update timeline
- Compare and correlate information and evidence from other records
- Update your research plan and to do list
- Save or print a copy of the record

Once you have cycled through your process multiple times and you feel you have effectively answered your research goal, write a conclusion statement, paragraph, or article. A conclusion states your hypothesis and the evidence you have to support your conclusion.

Conclusion

Organizing your files, your information, and your research process will help you become a more careful and thorough genealogy researcher.